Project Managers' Advisory Group (PMAG)

MINUTES
June 19, 2006

Attending:

Sharon Hayes	ITS/EPMO
Alisa Cutler	ITS/EPMO
Gaye Mays	ITS/EPMO
LaQuita Hudson	ITS/ES
Jim Tulenko	ITS
Charles Richards	ITS
Barbara Swartz	ITS
Jesus Lopez	ITS/EPMO
Bob Giannuzzi	ITS/EPMO
Shaw Erfani	ITS/EPMO
Carol Morin	DOC
Randy Moody	DENR
Angela Taylor	DHHS
Caroline Jackson	DHHS
Charles Fraley	DHHS/DIRM
Barbara Bostian	DOR

Bob Giannuzzi welcomed everyone to the meeting. Approval of minutes for May was called for and approved.

Sharon Hayes announced the successful completion of the PMP certification by **Barbara Swartz** (ITS) and **Steve Tedder** (ITS). A framed letter of congratulation signed by George Bakolia was presented to Barbara. The other will be handed to Steve. **Bob** noted that both Barbara and Steve had attended the EPMO PMP exam prep training program.

Bob Giannuzzi advised that the NCPMI Public Sector LIG would not be meeting in July. **Sharon Hayes** reported growing attendance at these meetings.

Bob Giannuzzi called for task group reports.
Methodology: **Alisa Cutler** reported that the Methodology group will be sending a draft of its Business Case document to the PMAG members for review prior to the July 17 monthly meeting.
PM Promotion and Education: **LaQuita Hudson** informed that the group had not yet met since the last PM Advisory Group meeting.
Mentoring and Training: **Bob Giannuzzi** will resume activities with the next meeting in a few weeks. **Sharon** added that the group should investigate the Department of Labor's apprenticeship program.
Earned Value: **Shaw Erfani** reported that the initial meeting is to take place on 6/23.

Bob Giannuzzi informed the group that **Gary Evans** is leaving DOT and made mention of his contribution to PMAG, especially in task groups. Although Gary was not present at the meeting, **Bob** thanked him in absentia.

Bob Giannuzzi circulated copies of the PMO Executive Council Summary of Member Services and Research Agenda for 2006-2007. **Bob** informed the group that he would continue to include upcoming teleconferences in the PM Advisory Group meeting minutes. Coming up:

Organization/website	Contacts	Upcoming Calls
http://www.nascio.org/ nascioCommittees/ projectManagement	Elizabeth VanMeter 859/514-9176 evanmeter@AMRms.com Access ***888/272-7337*** *conference ID* ***7544292#***	July 11 (3:00) Federal PM Certification Requirements August 1 (3:00) PM Maturity Assessments
PMO Executive Council http://www.pmo. executiveboard.com/ PMOEC/1,3241,,00.html	Register at website	July 25 (12:00) Decision-Oriented Reporting
Applications Executive Council http://www.aec. executiveboard.com/	Register at website	July 13 (11:00) Small Enhancement Delivery Management (PM process for small projects)
Information Risk Executive Council http://www.irec. executiveboard.com/	Register at website	July 18 (11:00) Organizational Planning I: Information Risk Budget and Spend Benchmarks

Shaw Erfani reported that the EPMO webpage has had no significant updates since the last meeting.

Sharon Hayes informed the group that the EPMO has budgeted for group onsite training tentatively this fall. **Charles Fraley** referred to a previous session centered around a vendor's PC-based project simulation. He and **Caroline Jackson** reported that that training was very valuable. **Bob Giannuzzi** added that the EPMO is also exploring the possibility of arranging onsite training on a particular topic of interest, with the cost shared by participating agencies.

Jim Tulenko announced that **Barbara Swartz** has joined his PPM tool management team. **Jim** also projected that the next new user training will be conducted around late July – early August. He also solicited topics for Lunch 'n Learn sessions. **Angie Taylor** suggested more clarification on the Change Request process, particularly during the Planning & Design phase. **Barbara Bostian** commended Jim's team for its timely response to PPM tool questions/problems.

Sharon Hayes expressed concern that several projects are slow in exiting Planning & Design and hence not baselining.

Charles Fraley would like to see the process better tie the high level risk analysis in the Project Information tab to the detailed RAMP kept by the PM. **Sharon Hayes** will address this with **Jim Tulenko**.

Gaye Mays presented an interesting analysis of the aggregate open issues in the PPM tool (See Attachment A).

Gaye then discussed the results of a minisurvey she conducted with representation from four agency PMOs on what they see as requirements for PM tools (See Attachment B).

Barbara Bostian shared both generic perspective on lessons learned (Attachment C) as well as lessons learned from a particular project at DOR (Attachment D).

Randy Moody discussed DENR lessons learned from procurement aspects of projects. His particular concern is the long turn around time in writing an approved RFP primarily due to stringent language restrictions (how things cannot be worded). **Randy** would like the EPMO to provide a benchmark best of breed example RFP to use as a model. **Sharon Hayes** will consider working on an RFP project management requirements and qualifications document.

Angie Taylor volunteered to present DHHS DIRM's *Deliverable Dictionary* and *Expectation for Deliverables* documents at next month's meeting. **Bob Giannuzzi** would also like more agencies to continue to share lessons learned from their projects.

Meeting adjourned at 4:25 p.m.

Attachment A

Issues Log Analysis **6/5/2006**

Ran report from 01/01/2006 thru 06/05/2006 for all open issues (total of 289); results by high level category risks is as follows:

Financial (79)
Communication (69)
Technical (47)
Resource (36)
Schedule (34)
Operational (10)
Project Mgmt (9)
Organizational (5)

Further analysis of each category indicates the following:

Financial Risks (27% of total) – primary issue regarded the difference of budget amounts recorded in the "Cost Tracking section" vs. the "Status" tab amounts (11 entries/14%)

Other areas were lack of benefits estimates, benefits start date not consistent with implementation date and missing ongoing operations and maintenance costs.

Communications Risks (24% of total) – most issues were regarding approval by the SCIO (24/35%)

Other areas concerned status reporting and lack of a correction plan for open issues

Technical Risks (16% of total) – major concerns/questions regarded security issues (20/43%), the only other frequent comment regarded defining of deliverables & milestones

Resource Risk (12% of total) – majority of issues regarded the accuracy/computation of total resource hours (19/53%), the only other frequent comment regarded development/updating of a staffing plan

Schedule Risks (12% of total) – primary issues were utilization rates and updating of completion percentages

Other area percentages of total:
Operational 3%
Project Management 3%
Organizational 2%

Attachment B

	Integrate with UMT Tool	PM Training	Portfolio Mgmt	Resource Mgmt	Change Mgmt.	Document Sharing	Web App./ Portal View	Graphics & Charts	Track actual time spent on project	Allocate % time spent by task	Multiple Views of Data	No duplicate work for agency	*Integrated Lessons Learned*
Interview 1			**X**	**X**	**X**	**X**	**X**					**X**	
Interview 2		**X**	**X**	**X**	**X**	**X**	**X**		**X**		**X**	**X**	
Interview 3		**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**	**X**
Interview 4	**X**												

Notes: Must be very user friendly and not create duplicate work for the agency

Attachment C

A Project Manager's Tool for Excellence: Lessons Learned

Why? There are two factors that provide an organization with a competitive advantage in today's world – **speed** (faster), the other **quality** (edge). Thus, the faster you learn and act on what you learn, the more of an advantage you have. Corollary: It does no good to learn if you do nothing with what you learn!

When? Major milestones in a project, or every three months, whichever comes first. 3 months seems to be the upper limit of what people can remember! Major milestones include the completion of project phases and at the end.
Corollary: Even a very short-term project can benefit from a Lessons Learned review! (If it is a 2-week project, take stock at the end of a couple days)

How? You are not trying to find people to blame for problems. Rather, you are trying to improve performance. Ask two specific questions:

1. What have we done well so far?
2. What do you want to do better in the future?

Set some ground rules. Focus on processes, not people. Some examples of processes are:

- Leadership
- Communication
- Decision-making
- Problem-solving
- Planning
- Teamwork
- Innovation
- Managing

Note: Leadership is the first process. This means that YOU must be willing to let members of the project team give you feedback on you leadership style.
Caution: the team will take their queue from your reaction. If you get defensive when people give you feedback, they will not do it again. Also if you do not act on their input, over time their motivation for constructive input will diminish.

Who? Communicate the shared learnings from the team to all stakeholders. Sponsors must be involved to be able to make better decisions in the future, especially those involving policy changes. Project managers, team members and subject matter experts and any who will serve on teams in the future should be able to access the Lessons Learned before undertaking the next project.

Excerpts from "Fundamentals of Project Management for Everyone"
Dr. James P. Lewis, Ph.D.

Attachment D

Wireless Feasibility Study Project
Lessons Learned

Did we do what we say we would?

Did we accomplish our goal? **YES! The Wireless Implementation Team implemented both solutions (the Wireless Air Card and the Blackberry device 30 days ahead of schedule (completed by June 2).**

A review of the Objectives section of the Project Charter, signed by the sponsors in March 2005:

Business Objectives

The following key business objectives are the criteria by which the project will be deemed successful:

Product Description (Solution):	Phase 1: Wireless Air Card Phase 2: Combination Device (Cell Phone/PDA/E-mail)
Scope:	✓ A business case evaluation for field personnel to securely access tax system data, the Internet and GroupWise from non-DOR network locations. The systems to be accessed included ITAS, GroupWise, the Internet and the DOR internal network.
Approach	✓ Determine if wireless efforts are worth pursuing (cost-effective vs. risk tolerance/disclosure rules) ✓ Determine costs for items and services ✓ Define constraints to Quality of Service ✓ Ease of usability ✓ Supportability

Criteria for Project Success:

1. **Measures of Success for evaluating hardware/software solutions:**
   - ✓ Field personnel will have the same level of connectivity as an Interstate auditor with broadband connectivity

2. **Measures of Success for feasibility study:**
   - ✓ Solutions are evaluated (Phase 1: Wireless Air Card, Phase 2: Combo Device)
   - ✓ The business case for each option is developed and progressively elaborated as more detail is known
   - ✓ The team decides upon an overall recommendation
   - ✓ The sponsor decide on prioritization and implementation funding/resource allocation

Positive Lessons Learned:

Implementation Approach

It was important to have a functional lead direct the business objectives and key personnel (end-users). The functional lead was very helpful in shaping the rollout schedule and designating the key resources for the pilot and from each office as we implemented the solution.

BEST PRACTICE: Designate the functional lead role early in the project and ensure the person has adequate responsibility and authority to make the decisions necessary for the project in a timely manner.

Designate IT leads from the onset of the project and include adequate time for their involvement (75-80% for the project duration). Also, ensure there are a primary and a backup for each role/responsibility. Early on in the project the technical lead designed the pilot approach to mitigate risk for the end-users and developed an easy spreadsheet for them to complete based on their experience (time, application accessed, location, etc.) Later, the technical team developed the approach for the combination device pilot test and rollout and worked very closely with the functional lead to rollout the wireless cards.

BEST PRACTICE: Get the very best people you can to work on your project. Listen to what they say and get out of their way as much as possible.

Testing

Including IT, Security and the business (end-users) for early identification of problems worked well. Using the pilot to iron out issues and determining best approaches was a good idea and we used it for both phases.

BEST PRACTICE: Be flexible in your testing process to ensure that you are not committing to bureaucracy for the sake of paperwork only. Develop the tools you need to meet the need (in this case, we used an Excel spreadsheet for the end-users). Consider piloting with a small group, especially those with a pent-up demand or who have a critical need.

Training

The training went very well because there was involvement from all parties – IT, Security and the business and commitment from the pilot users to attend the classes. We used the documentation from this effort and refined it for the implementation. The functional lead developed the training materials including:

Before Card Prep
Installation
Use
Troubleshooting Tips

BEST PRACTICE: Targeted, timely hands-on training works well. Also, the technical leads supported the end-users after training directly until training the Help Desk during the operational transition.

Requirements

The specifications document served as the requirements document for this implementation. It was in a checklist format and worked extremely well to designate the actual system requirements and expectations without being wordy or redundant.

BEST PRACTICE: Ensure that your requirements process meets the needs of all stakeholders adequately without being burdensome.

Opportunities for Improvement:

Requirements

The requirements for this implementation were very high-level (by design). This worked well in general for the business users, but led to communication difficulties between IT and Security in clear expectations at times.

BEST PRACTICE: Ensure that your requirements process meets the needs of all stakeholders adequately without being burdensome.

Training

By identifying and prioritizing the proper technical support resources at the initiation of the project, the right personnel can be trained as the product is developed. In addition, there needs to be targeted training developed specifically for support personnel. During the Blackberry deployment, technical resources were left “on their own” learning the product without the benefit of classes.

RECOMMENDED CHANGE: Ensure the plan allows for operational and support personnel to receive the right training prior to the support of end-users.

Project Methodology

The project communication was not adequate to meet the needs of all. The lines of communication became convoluted and the project manager should have held regular status meetings with the core team members and the sponsors at least bi-weekly with published minutes despite responsibilities to other projects. The project manager was under-allocated for this engagement.

BEST PRACTICE: Allocate the project manager’s time adequately. Project communications should be bi-weekly to all at a minimum.